



OPSEU Pension Trust

Fiducie du régime de
retraite du SEFPO

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**Employer Pre-Retirement
Death Checklist**

1. Personal Information			
Deceased Member's Last Name	First Name	Initials	Social Insurance Number

2. Less than 2 years of Credit and Continuous Membership		
Documents Required	Attached	Requested
Notification of Death of Plan Member (OPTRUST1063)	<input type="checkbox"/>	<input type="checkbox"/>
Death Certificate or Funeral Director's Proof of Death	<input type="checkbox"/>	<input type="checkbox"/>
<i>If eligible spouse:</i>		
Declaration of Spousal Relationship (OPTRUST1059)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Marriage (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Common-Law/Same Sex Relationship (if applicable) – 3 supporting documents required (see back of this form)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Social Insurance Number	<input type="checkbox"/>	<input type="checkbox"/>
<i>If no spouse, but eligible child(ren):</i>		
Proof of Birth of eligible child(ren)	<input type="checkbox"/>	<input type="checkbox"/>
Declaration of Attendance at School or University (OPTRUST1031) (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Social Insurance Number for each eligible child	<input type="checkbox"/>	<input type="checkbox"/>
Contact address information for each eligible child	<input type="checkbox"/>	<input type="checkbox"/>

3. Two or more years of Credit or Continuous Membership		
Documents Required	Attached	Requested
Notification of Death of Plan Member (OPTRUST1063)	<input type="checkbox"/>	<input type="checkbox"/>
Death Certificate or Funeral Director's Proof of Death	<input type="checkbox"/>	<input type="checkbox"/>
Member's Proof of Birth	<input type="checkbox"/>	<input type="checkbox"/>
Non-CORPAY Paid Member's Contributions (OPTRUST1013) (ABC members only)	<input type="checkbox"/>	<input type="checkbox"/>
<i>If eligible spouse:</i>		
Spouse's Proof of Birth	<input type="checkbox"/>	<input type="checkbox"/>
Declaration of Spousal Relationship (OPTRUST1059)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Marriage (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Common-Law/Same Sex Relationship (if applicable) – 3 supporting documents required (see back of this form)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Social Insurance Number	<input type="checkbox"/>	<input type="checkbox"/>
<i>If pre-1987 service - Void cheque or banking information</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>If no spouse, but eligible child(ren):</i>		
Proof of Birth of eligible child(ren)	<input type="checkbox"/>	<input type="checkbox"/>
Declaration of Attendance at School or University (OPTRUST1031) (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>
Proof of Social Insurance Number for each eligible child	<input type="checkbox"/>	<input type="checkbox"/>
Contact address information for each eligible child	<input type="checkbox"/>	<input type="checkbox"/>

Employer: (PLEASE PRINT) _____

Employer Official's Name (PLEASE PRINT): _____ Telephone No.: (____) _____

SPOUSAL RELATIONSHIP INFORMATION SHEET

In order to determine your spouse's eligibility to receive survivor benefits, we require the following documentation as confirmation of your spousal relationship at the time of termination and death.

COMMON LAW AND SAME SEX SPOUSES

Declaration of Spousal Relationship (OPTRUST1059).

AND

Any **three (3)** pieces of the following documentary evidence under a) to h) below.

- a) copies of birth certificates or formal adoption papers for children of the member and the spouse.
NOTE: If you are not the natural or adoptive parents of a child, please ensure that all remaining documents you choose to submit demonstrate that your spousal relationship was at least three years in duration at the time of termination and death.
- b) supporting sworn affidavit of a third party who knows the spouse and the member during the period that they have lived together as spouses.

A sworn affidavit is a legal document signed by the third party and sworn before a Commissioner of Oaths (eg. lawyer, judge). Each sworn affidavit must state:

- i) how long the third party has known the spouse and the member;
 - ii) the period or periods of cohabitation, including any period of separation;
 - iii) any other knowledge and belief the person has that the individuals live together as spouses
- c) a sworn affidavit from an immediate relative of the member providing the same information as the above affidavit;
 - d) copies of deeds or leases showing any jointly held or leased property or liabilities, for example mortgages, bank accounts, etc.;
 - e) any evidence that the spouse and the member have named each other as beneficiary of RRSP's, life insurance policies, pensions or other investments;
 - f) a copy of the member's Will;
 - g) previously submitted Statement of Spousal Relationship (OPTRUST3007);
 - h) copies of the previous three years' tax returns of both the member and the spouse.

AND

Copies of divorce judgements, separation agreements, marriage contracts or cohabitation agreements with respect to any previous relationships of the terminating member if they impact on the accrued pension entitlement (i.e. if there is a requirement to split the pension entitlement).

MARRIED SPOUSES

Declaration of Spousal Relationship (OPTRUST1059).

AND

Copy of certificate of marriage;

AND

Any copies of divorce judgements, separation agreements, marriage contracts or cohabitation agreements with respect to any previous relationships of the terminating member if they impact on the accrued pension entitlement (i.e. if there is a requirement to split the pension entitlement).